Montana Public Employee Retirement Administration

Agency Information Technology Performance Report
2017 Biennial Report

Please complete this report by close of business October 25, 2016.
Please upload your final Performance Report and all applicable spreadsheets to your individual Agency folder in the Biennial Reporting SharePoint Site found at:
https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.

MCA 2-17-521(4) requires the Department of Administration to prepare a biennial report on Information Technology (IT) based on the Agency IT Plans and Performance Reports required under MCA 2-17-524.

This performance report evaluates progress made towards the objectives articulated in your 2014 Agency IT Plan, which can be found at:
https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.

Please answer each section below based on your 2014 Agency IT Plan (*add lines to the tables as needed*).

Section 1: An evaluation of the Agency's performance relating to IT (MCA 2-17-524(3)(a)).
- Referencing the goals and objectives noted in Section 10 of your 2014 Agency IT plan, please fill in the table below with the information for each goal and objective.
  - o 2014 Agency IT plans can be found in your Agency folder located at https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.
- Please provide an update on the efforts to implement your Agency 2014 IT goals and objectives. Your update may include how a goal/objective has advanced the Agency mission.

GOAL	OBJECTIVES	UPDATE
Successfully implement MPERA's overall customer service, business operations and technology improvement program (MPERAtiv)	Continue emphasis on support and maintenance of existing IT infrastructure.	Completed. MPERA's legacy systems supported the agency through implementation.
Successfully implement MPERA's overall customer service, business operations and technology improvement program (MPERAtiv)	Successfully implement PERIS, our new Line of Business (LOB) pension administration system.	Completed. PERIS launched July 11,2016. This was delayed compared to original plan to support better system quality.
Successfully implement MPERA's overall customer service, business operations and technology improvement program (MPERAtiv)	Maintain accuracy and integrity of data.	Completed. PERIS launched July 11,2016. This was delayed compared to original plan to support better data quality.
Maintain SITSD recommended standards and policies	Maintain SITSD recommended hardware and software standards for MPERA staff and customers and ensure MPERA is in compliance with state policies	Completed.

Section 2: An assessment of progress made toward implementing the Agency IT Plan (MCA 2-17-524(3)(b)).
- Please detail progress made toward completing IT projects identified under section 11 of your 2014 Agency IT Plan.
  - o Your Agency plan can be found in your Agency folder located at https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.
- Please include project cost, schedule and completion information.

ITEM	DESCRIPTION	ACTUAL AS OF JUNE 30, 2016
Project Name	MPERAtiv – PERIS - Line of Business (LOB) pension administration system	
Agency / Division	DOA / MPERA	

Revised November 23, 2016

Project / Program purpose and objectives	• Improve business processing to meet customer expectations • Provide improved services, effectiveness and efficiency • Provide its plan members and retirees with the ability to access account information through the Internet • Continue to address the demands of customers and changes in business processes to effectively support and administer our retirement plans	
Estimated start date	July 9, 2012	July 9, 2012
Estimated cost	$7,850,000	$8,893,012
Funding source – 1	Pension Administration	Pension Administration
Funding source – 2		
Funding source – 3		
Annual costs upon completion	$352,800	$352,800 (support and infrastructure)
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	100%	

ITEM	DESCRIPTION	ACTUAL AS OF JUNE 30, 2016
Project Name	MPERAtiv – Data Cleansing	
Agency / Division	DOA / MPERA	
Project / Program purpose and objectives	Provide MPERA with expert assistance to perform data profiling, cleansing and migration services. The advice, guidance and work will be provided through the services of experts with extensive experience providing related data services as part of a Line of Business (LOB) system replacement project in the area of public sector pension benefit administration.	
Estimated start date	August 5, 2011	August 5, 2011
Estimated cost	$487,098	$705,555
Funding source – 1	Pension Administration	Pension Administration
Funding source – 2		
Funding source – 3		
Annual costs upon completion	$0	$0
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	100%	

ITEM	DESCRIPTION	ACTUAL AS OF JUNE 30, 2016
Project Name	MPERAtiv – Internal Costs	
Agency / Division	DOA / MPERA	
Project / Program purpose and objectives	Internal costs estimated by MPERA to support the MPERAtiv program. These costs include personal services, other services and supplies and materials.	
Estimated start date	March 14, 2011	March 14, 2011
Estimated cost	$2,422,161	$3,785,610
Funding source – 1	Pension Administration	Pension Administration
Funding source – 2		
Funding source – 3		
Annual costs upon completion	$0	$0

Revised November 23, 2016

Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	100%

Section 3: An inventory of agency information services, equipment and proprietary software (MCA 2-17-524(3)(c)).

To collect data on "information services" and "proprietary software", we are leveraging LDRPS (L10). Our goal is to utilize and maintain LDRPS as the authoritative source for this information.

- Please verify the information in the LDRPS Spreadsheet, making any necessary updates or additions.
- Please email your updated spreadsheet to Dawn Pizzini, subject matter expert, at dpizzini@mt.gov.
    - The LDRPS spreadsheet can be found in your Agency folder located at https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.
    - We will pull a final LDRPS Spreadsheet for submission as part of the Biennial Report based on your Agency's input.

For "equipment", we are utilizing the standard Agency Inventory Template Spreadsheet we have used for past biennial reporting and that we are currently using to gather information for the IT Convergence project. The spreadsheet can be found in your Agency folder located at https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.

- If you **have** already provided your inventory for the IT Convergence project, please fill out the last tab labeled **DEVICES**.
    - Please review the entire workbook for accuracy and make any necessary changes.
- If you **have not** provided this inventory, please fill out the entire workbook.

Questions can be directed to:

Jennifer Schofield	Amber Conger
jschofield@mt.gov	aconger@mt.gov
406.444.2926	406.444.5764

Please complete this report by close of business October 25, 2016.
Please upload your final Performance Report and all applicable spreadsheets to your individual Agency folder in the Biennial Reporting SharePoint Site found at:
https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx.